

Figure 1

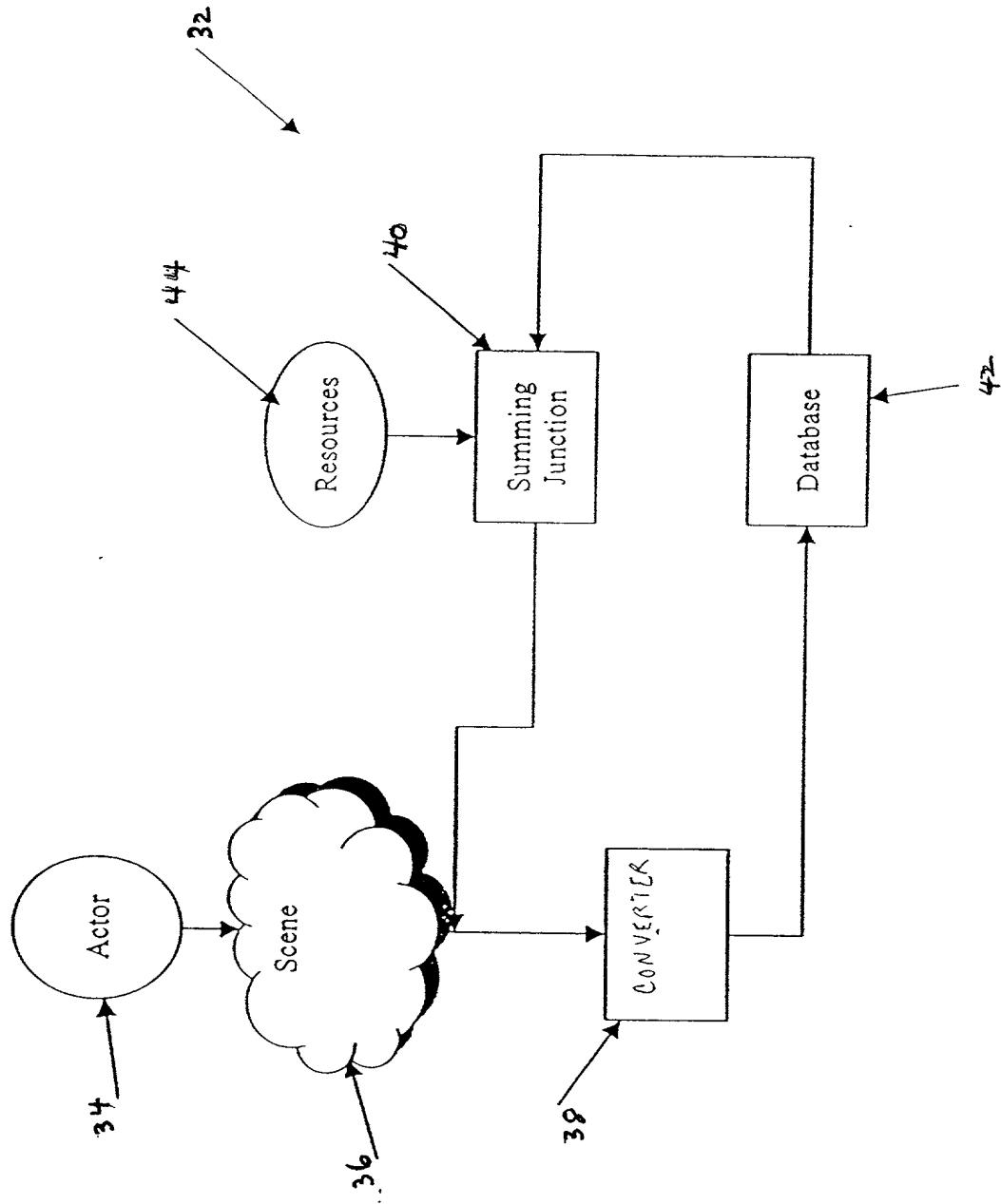


FIGURE 2

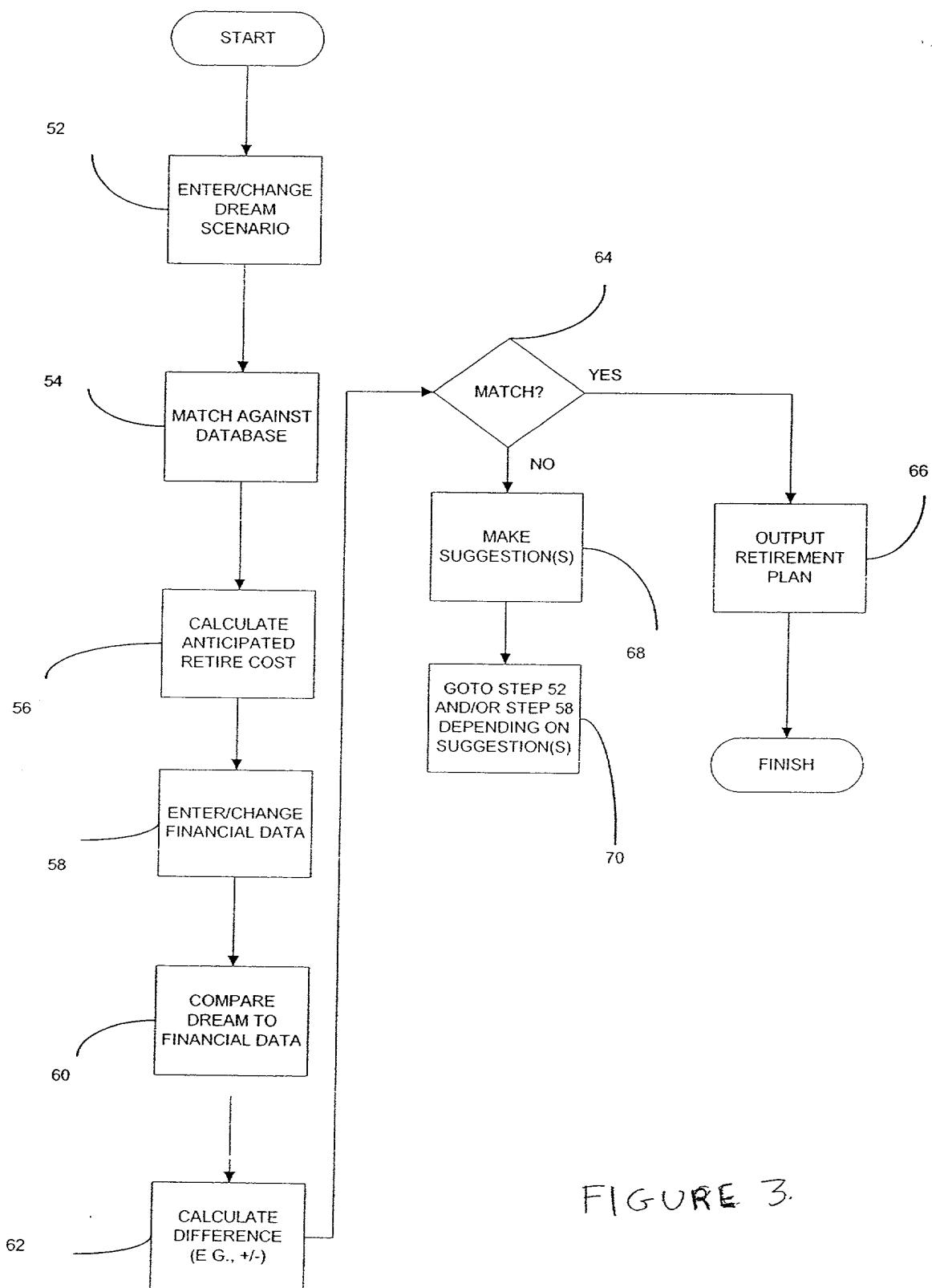


FIGURE 3.

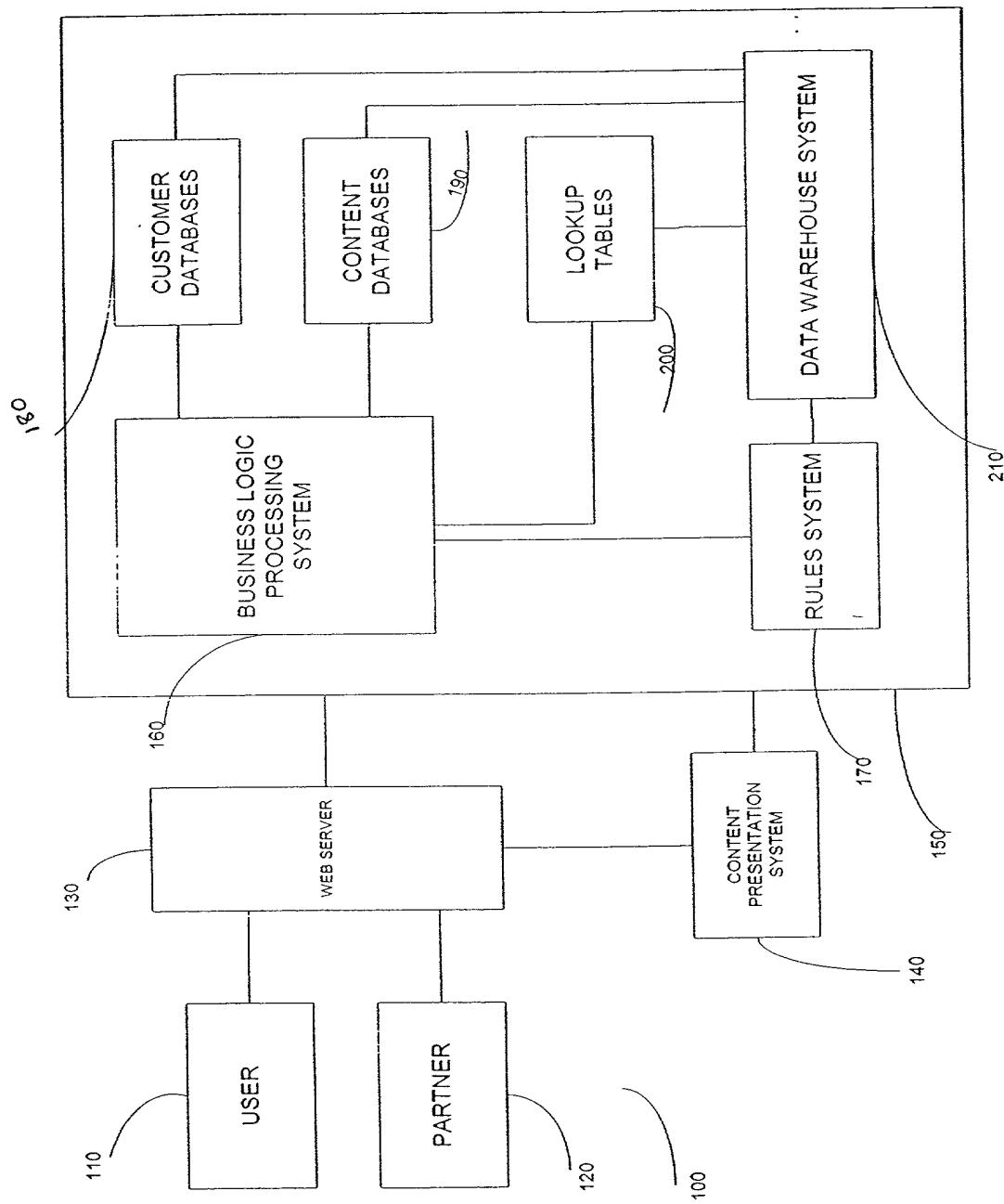


FIGURE 4

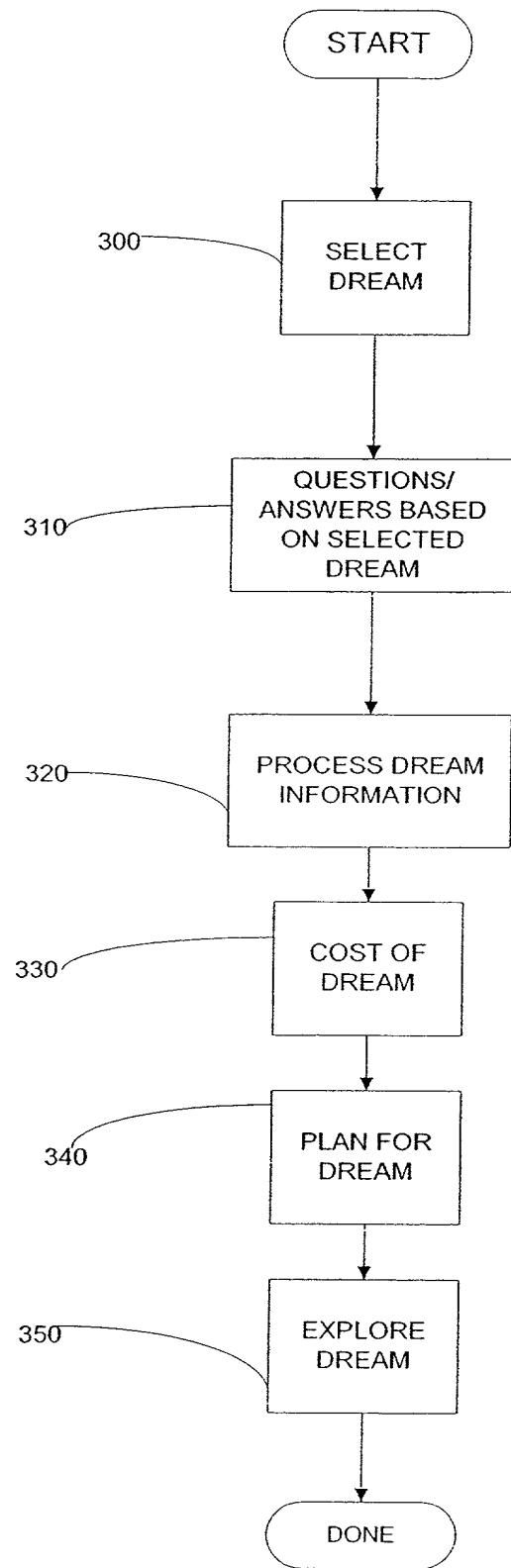


FIGURE 5

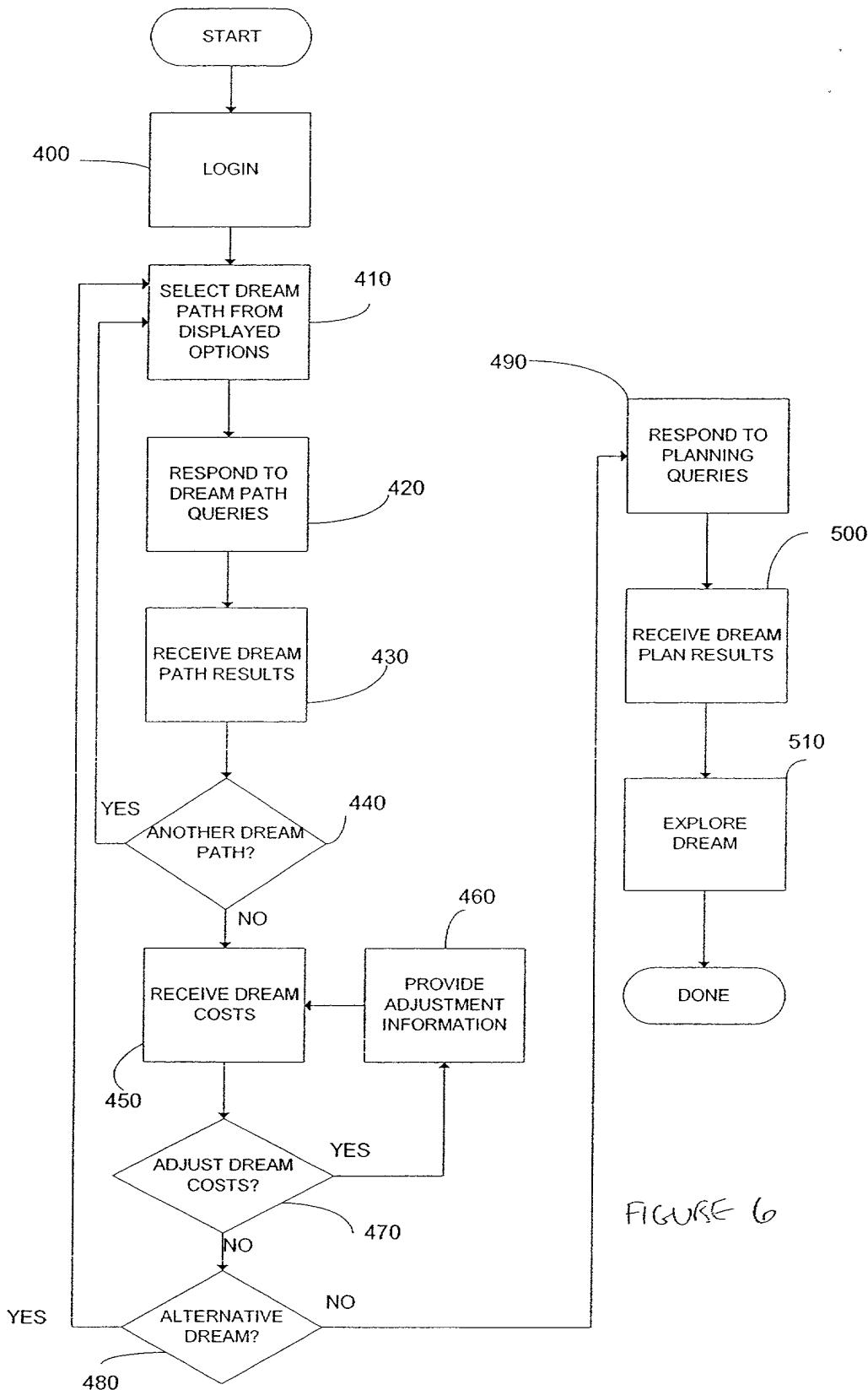


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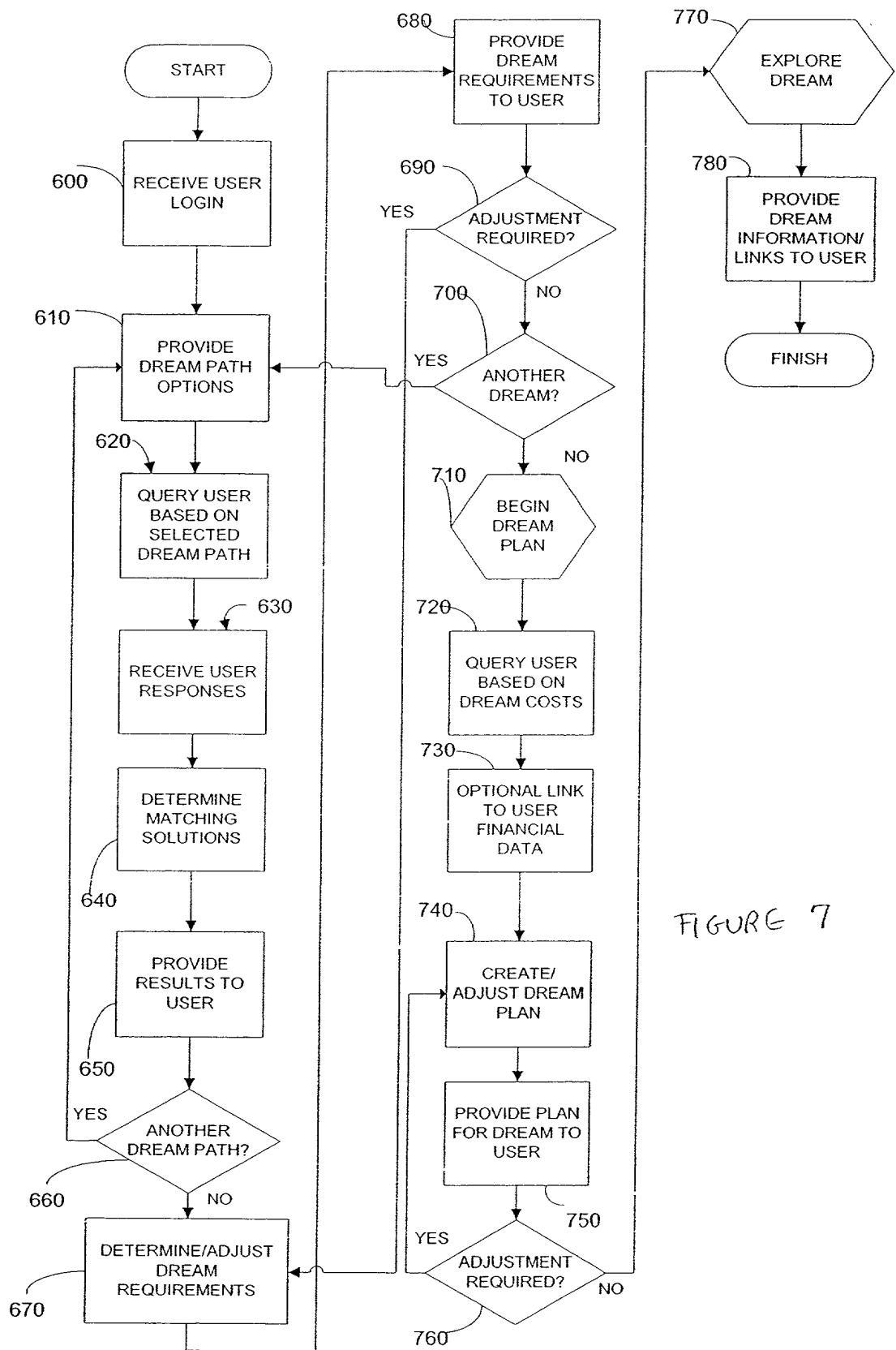


FIGURE 7

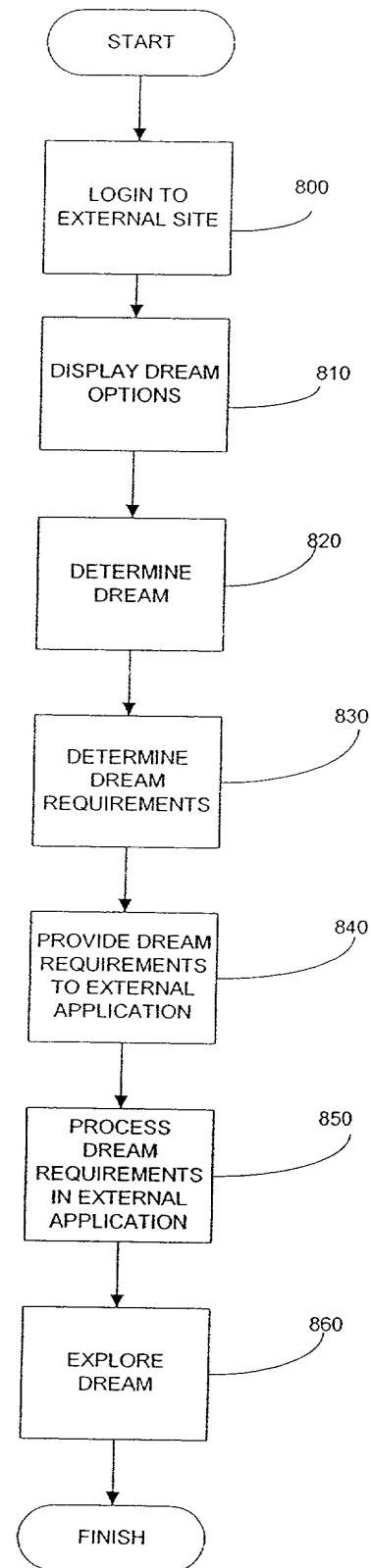
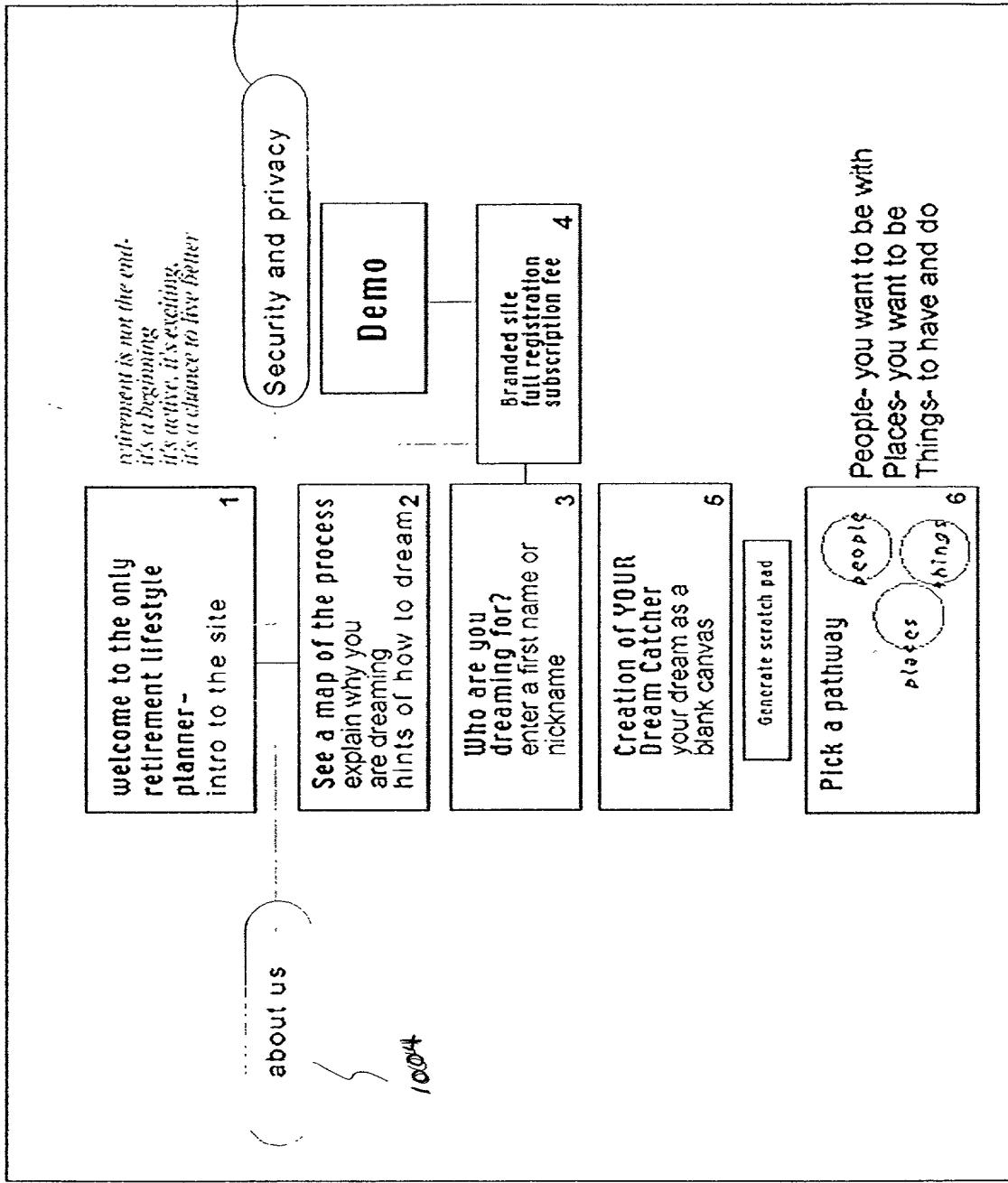
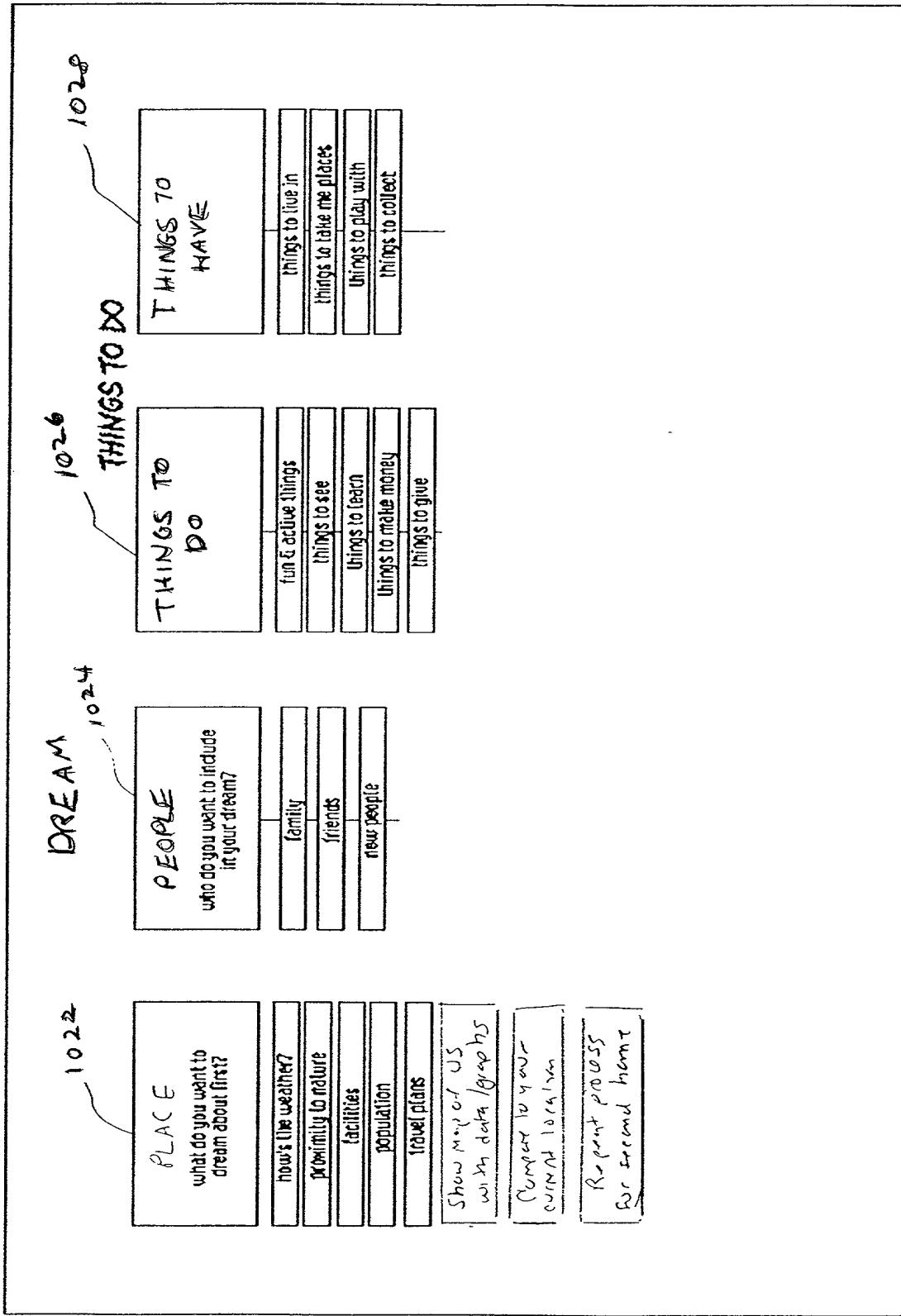


FIGURE 8





1020

FIGURE 10

PLACE

what do you want to
dream about first?

Primary residence Secondary residence U.S. travel destination

how's the weather?

in mid-winter

temperature should be

any cold 30 or lower mild 80 or higher

amount of rain
if they pick cold than this says "snow"

any light mild heavy

humidity

any low mild high

sunshine

any cloudy mixed always sunny

wind

any calm mild windy

in mid-summer

temperature should be

any so cold 50 or lower mild 80 or higher

amount of rain
if they pick cold than this says "snow"

any light mild heavy

humidity

any low mild high

sunshine

any cloudy mixed always sunny

wind

any calm mild windy

go through
running columns

FIGURE 11

1050

What is key in finding a location for your second home:

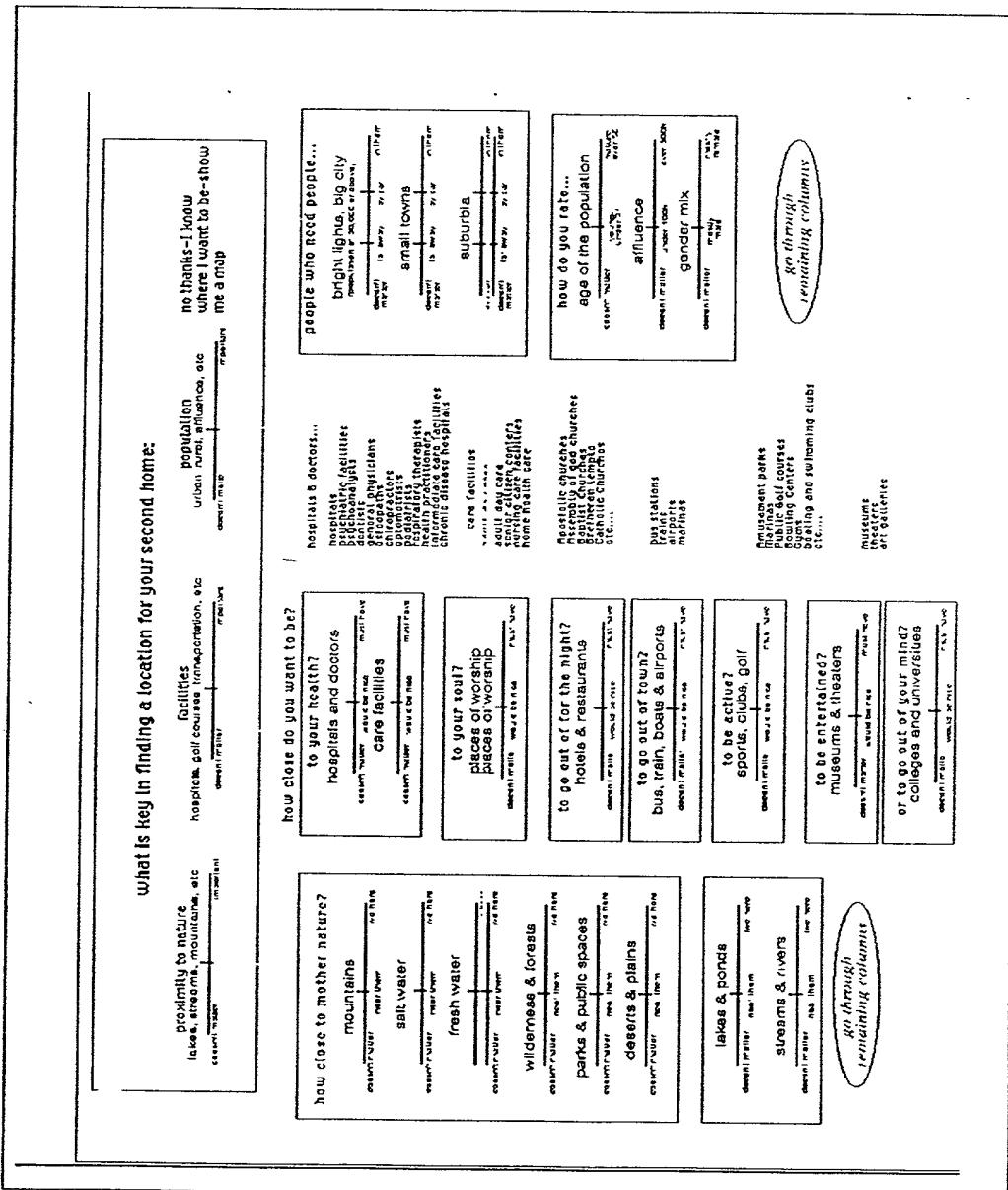


Figure 12

summary screen

so far your choices to live are:

- temperature - hot
- humidity - low
- fresh water - live here
- places of ownership - must have

make changes
make things

here are the places that best fit
your preferences so far

show me more

1. County 1, Co.
2. County 2, W.
3. County 3, N.
4. County 4, Cl.
• show me next 4 suggestions

I want to make adjustments ►

place description
facts & figures
& chart

I want to compare this to where I live now

I want to look at my other choices

FIGURE 13

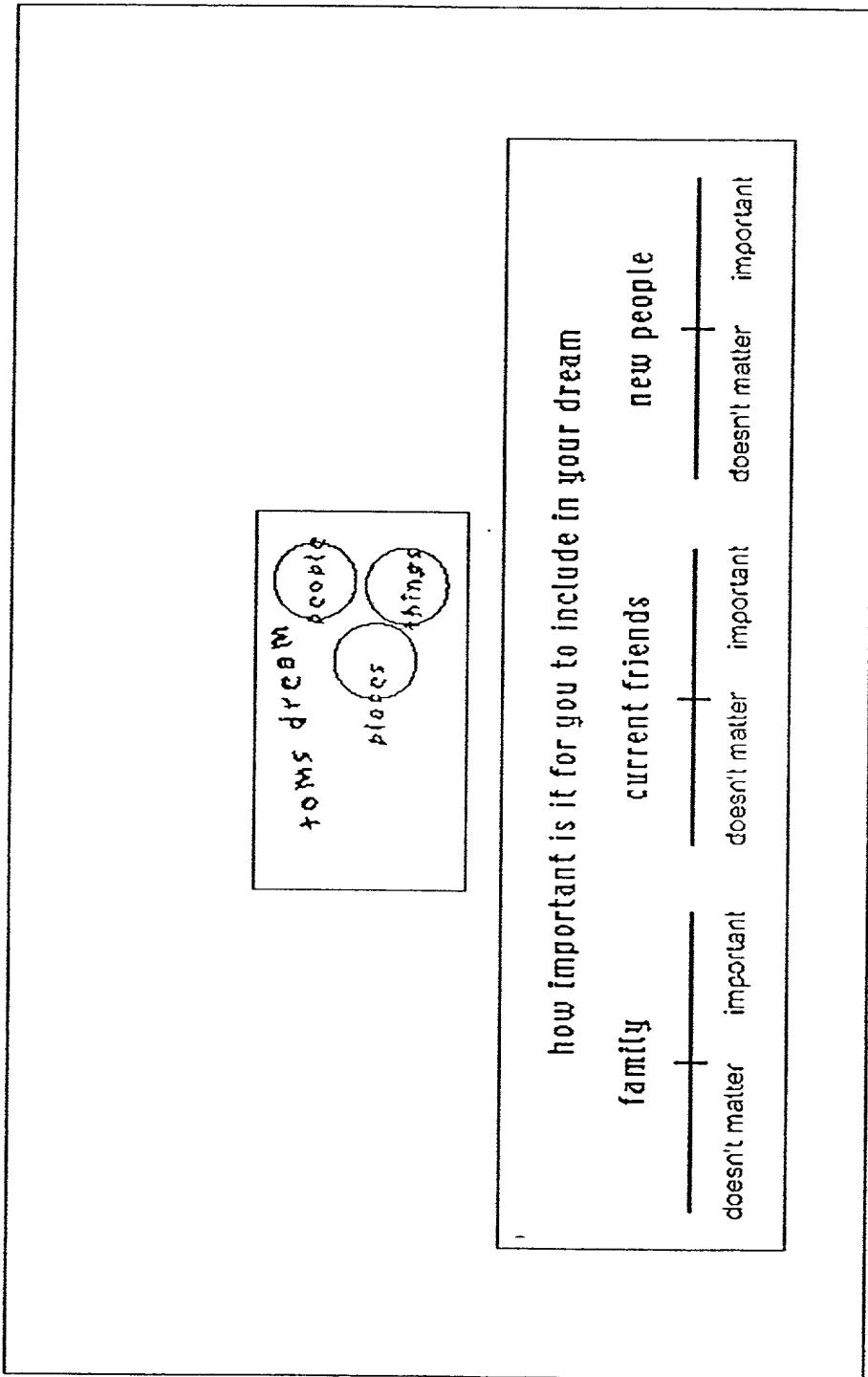


FIGURE 14

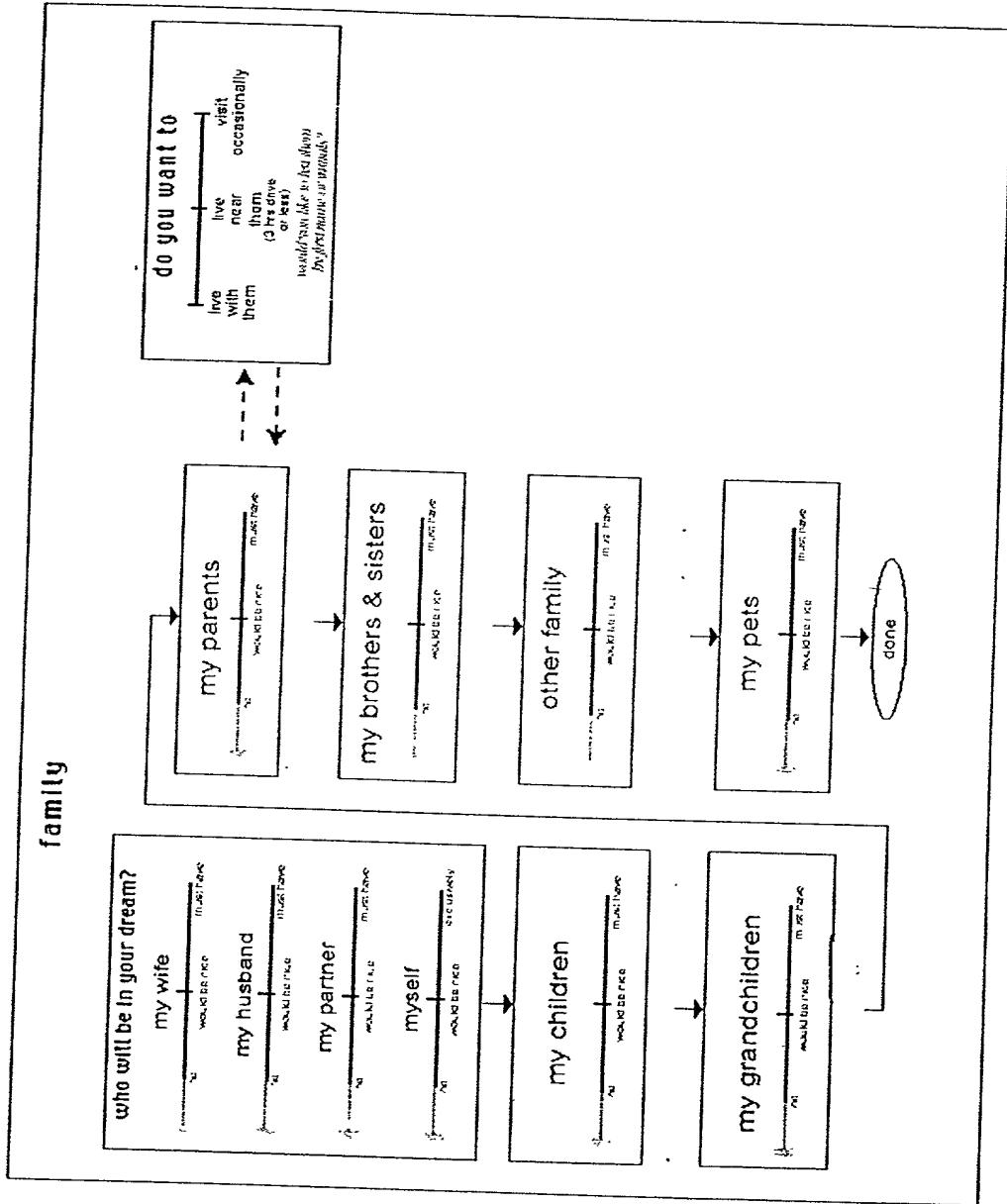
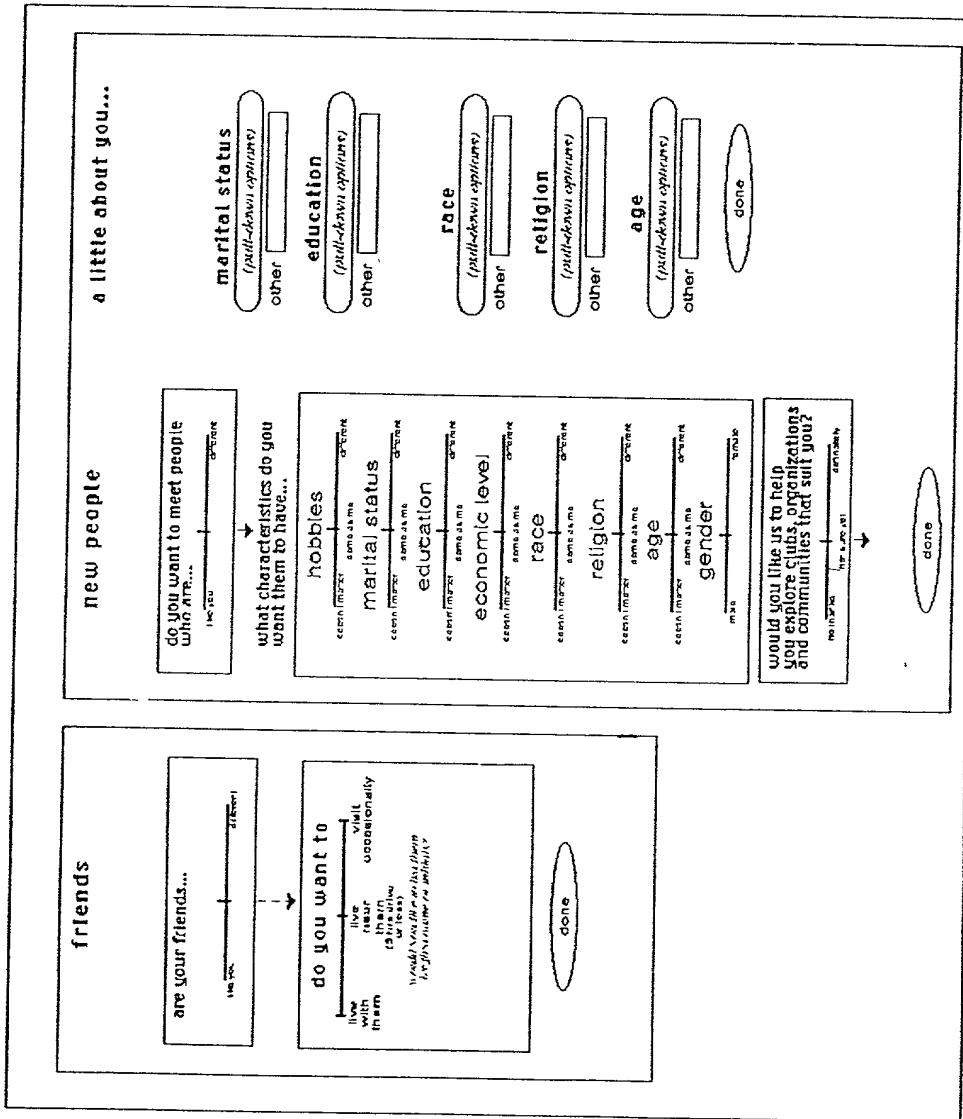


Figure 15



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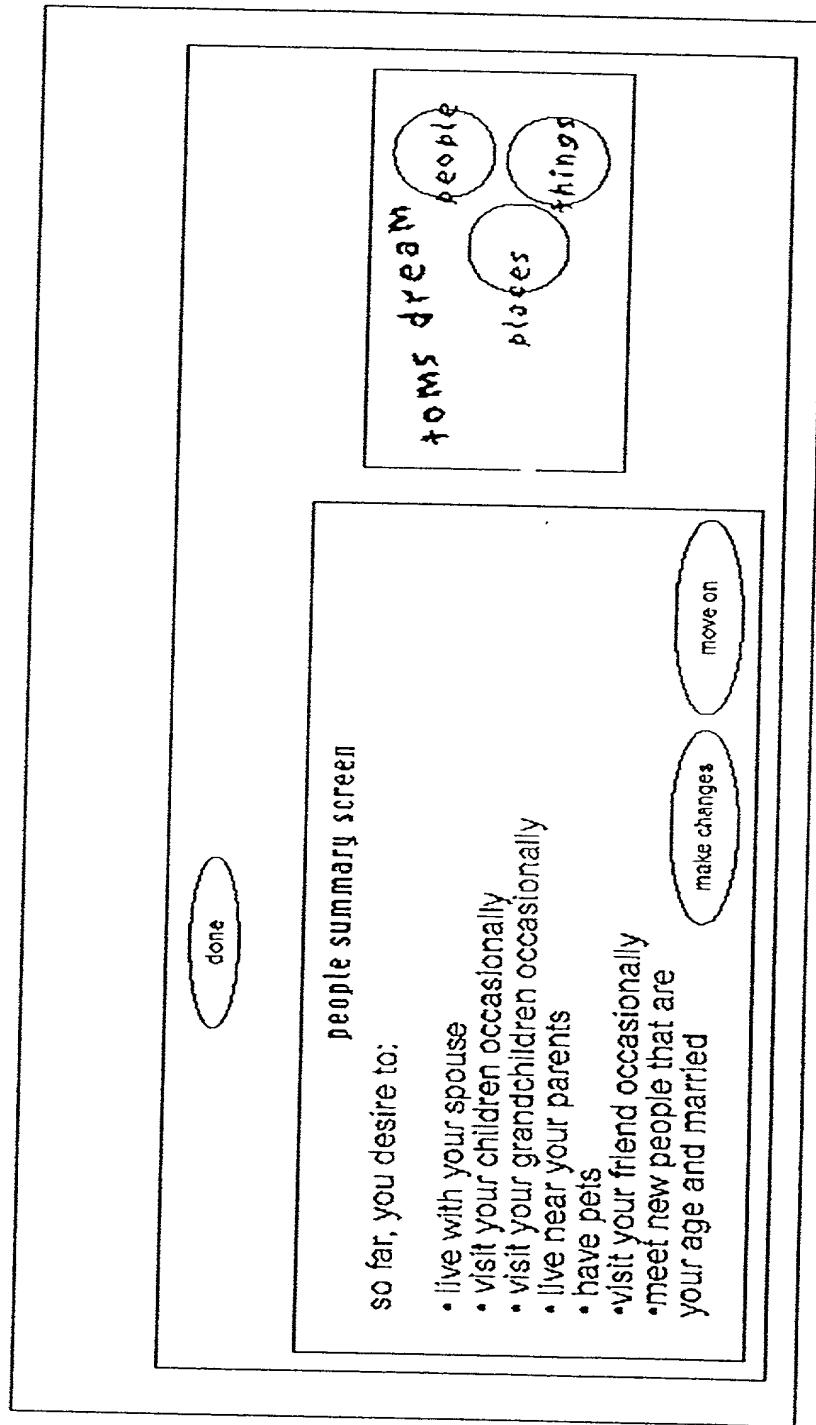


Figure 17

THINGS- to do

what types of activities are important to you?

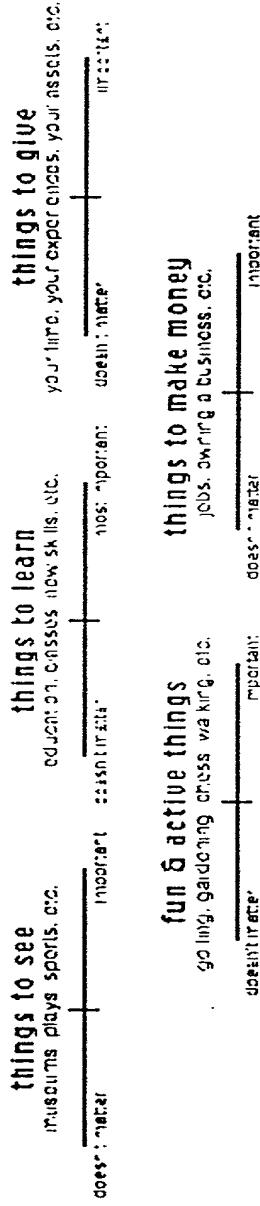


Figure 18

active things

let us help you pick an activity

I want to do them...

don't care inside both outside

don't care with a lot of people both alone

don't care on land both on water

don't care warm weather both cold weather

don't care with my mind both with my body

I know what I want.
show me a list of activities**things to see**

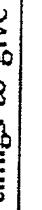
what would you like to see

CULTURAL EVENTS
concerts, plays, art shows, etc.

don't care must see

SPORTING EVENTS
football, soccer, basketball, etc.

don't care must see

NATURE
mountains, oceans, lakes, waterfalls, etc.I know what I want.
show me a list of things to see**things to learn**

would you like to learn...

NA for professional purposes

both personal benefit

NA for fun

both for official credit

NA from friends & neighbors

at a community accredited institution

NA from friends & neighbors

at a community accredited institution

NA from friends & neighbors

my investments

no way maybe definitely

no way maybe definitely

17

FIGURE 17

things to give

what would you like to give

my time

not interested to the community to my family both

not interested to the community to my family both

not interested to the community to my family both

not interested to the community to my family both

my experience/knowledge

my assets

my own business

no way maybe definitely

no way maybe definitely

no way maybe definitely

no way maybe definitely

Main things to do summary screen

here is a summary of the things you've picked that you want to do. feel free to go back and add, take out or make any changes that you want to make.

when you are ready to move on, click here [move on](#)

the activities you'd like to participate in are:

- play golf often
- make baskets underwater often
- play basketball occasionally

things you'd like to see:

- plays often
- nat'l parks occasionally
- pro football occasionally

things you'd like to learn:

- at an accredited institution
- for professional purposes
- for fun

you'd like to make money by:

- starting your own business
- starting to invest

you'd like to give your:

- time to the community
- assets to charities and family

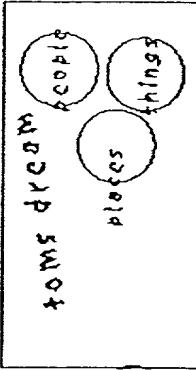


Figure 20

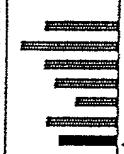
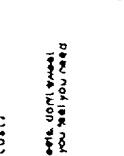
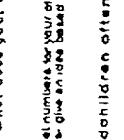
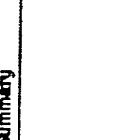
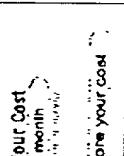
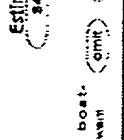
| TOMS dream | | what does your dream cost? | |
|--|--|---|--|
| Your Place: You want to live in Golden, Colorado You have a 1000 sq ft. home You want to live in Malibu, California You have a 1000 sq ft. home You want to live in Golden, Colorado You have a 1000 sq ft. home You want to live in Malibu, California You have a 1000 sq ft. home | | Explore Cost  Adjust | |
| Place People Things When Summary Other costs of living to consider: healthcare-related expenses groceries, utilities... health, life insurance... utilities, taxes... homeowner's insurance... | | Explore cost specific to region  Adjust | |
| TOMS dream Your things to do: You want to go to shows You want to go to restaurants You want to go to the beach You want to go to the mountains You want to go to the ocean | | what does your dream cost? Explore Your Cost  Adjust | |
| Place People Things When Summary Other costs of living to consider: healthcare-related expenses groceries, utilities... health, life insurance... utilities, taxes... homeowner's insurance... | | what does your dream cost? Explore Your Cost  Adjust | |
| TOMS dream Your things to do: You want to visit your grandparents often. You want to go to the beach You want to go to the mountains You want to go to the ocean | | what does your dream cost? Explore Your Cost  Adjust | |
| Place People Things When Summary Other costs of living to consider: healthcare-related expenses groceries, utilities... health, life insurance... utilities, taxes... homeowner's insurance... | | what does your dream cost? Explore Your Cost  Adjust | |
| TOMS dream Your things to have: You want to own a boat You want a house do you want to allow for the? | | what does your dream cost? Explore Your Cost  Adjust | |
| Place People Things When Summary | | what does your dream cost? Explore Your Cost  Adjust | |

Figure 22

FIGURE 22

401k dream

What does your dream cost?

When you want to start your new life? in 17 years

Please People Things | When Summary

401k dream

Your Place

Golden, Colorado
two bedroom, acre of land.
6 months a year

adjust omit explore your cost

Malibu, California
condo near the ocean.
6 months a year

adjust omit explore your cost

Your people
visits to grandchildren

\$700 per month adjust omit explore your cost

Your things to do
soc & shows

adjust omit explore your cost

Your things to buy
boats

adjust omit explore your cost

17 years from now adjust omit explore your cost
In the year 2017 you will
be able to realize your dream for a ballpark budget of \$6460/month ~~\$6460/month~~
or ~~\$6460/month~~

how are you feeling right now?

comfortable excited

- I want to plan for my dream
- I want another dream
- I want to explore my options
- I want to save my dream

When People Things | Summary

16 Sept 23

**Financial Plan Lite
Calculator**

401ks & dream

1) what is your total household income?

2) how much of that do you expect to save each year?

 • in your retirement plans (401k, 403b, 457, RA, etc)

 • other (stocks, bonds, mutual funds, CDs, etc)

3) how much in savings do you currently have?

 • in your retirement plans (401k, 403b, 457, RA, etc)

 • other (stocks, bonds, mutual funds, CDs, etc)

4) what is the value of the house(s) & property you own?

 • approximate market value

 • approximate mortgage debt

5) years to retirement

 • your current age

 • the age you want to retire at

6) what annual investment rate of return do you want to assume?
 (choose a rate of "1" before taxes)

 • for your retirement plan assets

 • for your other assets

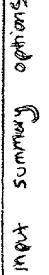
next  options

Figure 24

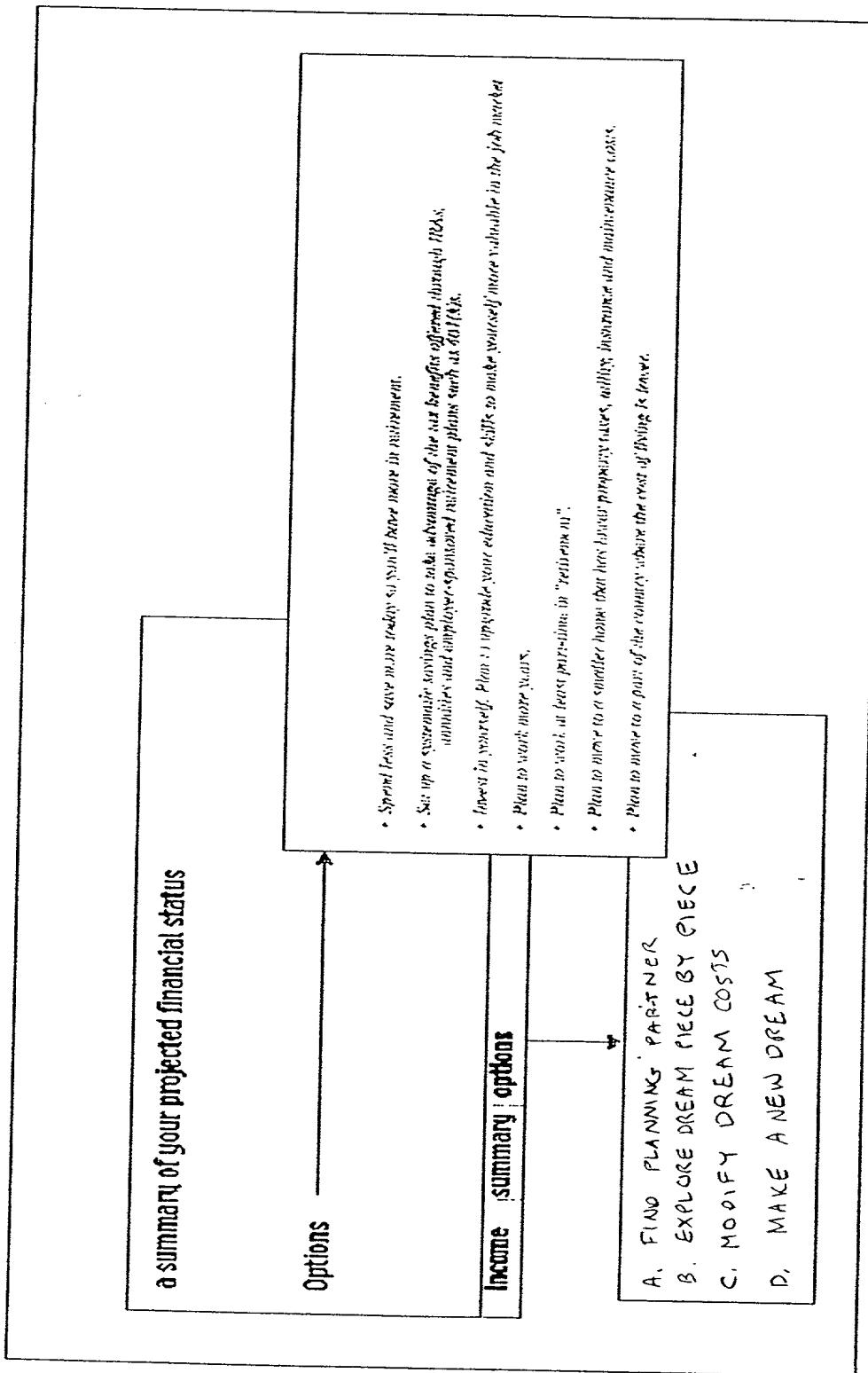


FIGURE 25

place people things

EXPLORE

dream

tom's dream

people

places

things

Explore tool kit

- drill-down detail on chosen location
- compare to other county or zip detail
- search for locations that match specific attribute

Search Results

- Golfing the Colorado Way
- Denver Golf Association
- Rocky Mountain Golf Supply
- etc.

Search Results

Golfing the Colorado Way

etc. (Results in less than 1/21)

Go back to my homepage

Get back to my homepage

cost module

plan module

add

Golfing the Colorado Way

To this:

- Place Module
- People Module
- Things to Do Module
- Things to Have Module

Things to Do

Golfing the Colorado Way

Add to Budget?

yes no

things to do golfing sleeping bridge

Guide to Golfing in Colorado

Explore the many opportunities in Colorado

Golfers Digest Official Site

The Official website of the premiere golf magazine

Golfing the Colorado Way

The Official website of Colorado Golfing

FIGURE 26

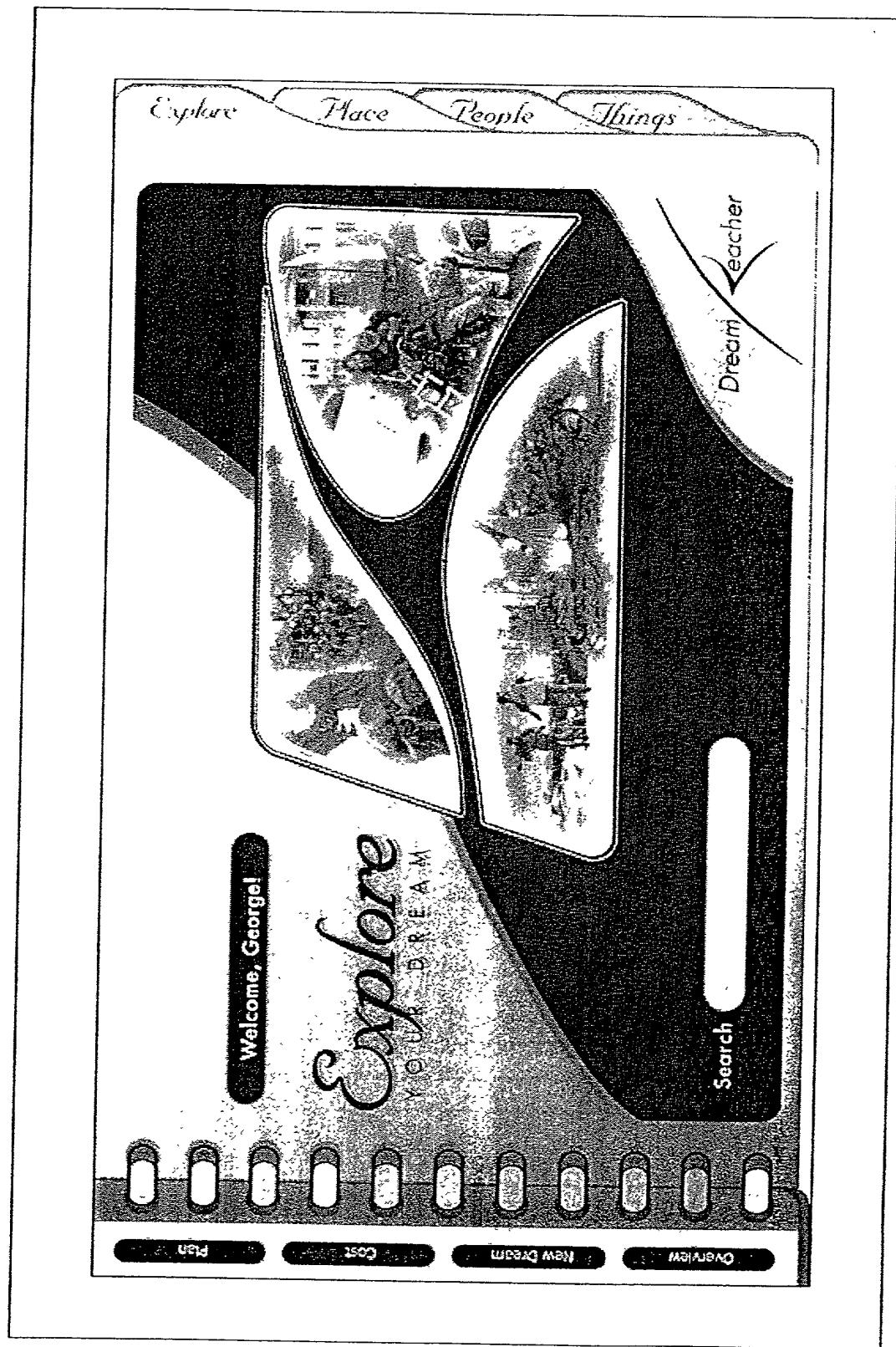


FIGURE 27